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Business Analysis (BAPL)

Reporting Requirements

<<Project Name>>

**Document Controls**

**Project Information**

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**Version History**

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Nature of Amendment | Changed By |
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***Template Usage Guidelines***

***The text mentioned below is to be used as a reference guide while completing this document. Remove this section/page after completing/before-publishing this document.***

1. *The dark blue text represents help/instructional text in the template – please remove it from the final version and/or before publishing the document.*
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3. *Fill in Sections with relevant information for the document created.*
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5. *Do not forget to update the table of contents figures and caption tables (Reference tab in MSWord) once the document is complete.*

Report Name: <<Insert Report Name>>

|  |  |
| --- | --- |
| **Description** | *[A description of what the report is displaying, e.g. A report listing all Customers by Region]* |
| **Priority** | *[Is the priority for this report to be developed Highly Important, Important, Desirable]* |
| **Actor** | *[The actor who will access the report, e.g. Manager, Administrator]* |
| **Report Access** | *[Where does the user access the report from - via a menu within the application (this is normally for report which part of a business process task), a specific report application (this is normally for reports which are non-operation and do not occur within a specific task of a business process)]* |
| **Generation Trigger/Frequency** | *[Is the report to be generated on an ad-hoc basis, or is a time scheduled]* |
| **Report Output Format** | *[How is the report viewed, i.e. to screen and then print, printed, ability to export]* |
| **Report Printer** | *[Which printer will the report be sent to, e.g. only to the PC default printer] Make N/A if not applicable* |
| **Fixed Selection Criteria** | *[The names of the data items that will not change when the report is generated, e.g. the status of the customer displaying in the report will always be Current, therefore Customer Status = Current]* |
| **Parameterised selection criteria** | *[The names of all data items that the report user will need to select in order for the information to display, e.g. Customer name, Product name, Region name – include if this is to be via a drop down list, if there are any constraints e.g. if Product x selected then only display the Regions that are associated with that Product, also the ability to select one or many. If Date From and Date To are used, specify what these dates actually refer to]* |
| **Grouping** | *[How is the data to be grouped, e.g. by Customer, and within that by Category, i.e. a primary and secondary sort]* |
| **Group Summary** | *[Does the report need to calculate a numeric and display a value at the end of each group, e.g. Customer XX – 115 customers]* |
| **Report Details** | *[A listing of all of the data items that are to display on the report in the order they are to display, e.g. Customer Name – Surname then first name, Sex, Age]* |
| **Data Sort Order** | *[How is the data to be sorted and then to display, e.g. by Surname A-Z, by Age, by Postcode ascending]* |
| **Report Formulas/Calculations** | *[Any specific calculations that are required for the report, e.g. Customer Waiting time for a specific Product – calculated by the number of days between the Date Added to Wait List and the date on which the report is run]* |
| **Special Requirements** | *[Any special requirements, e.g. to display and print Portrait or Landscape, Wrap text if required, print onto letter head paper, Page break at the end of each group, Headers etc.]* |